

A Situation Assessment Coordinated Habitat Conservation and Restoration in Montana

INTRODUCTION

Montana Fish, Wildlife and Parks developed the Comprehensive Fish and Wildlife Conservation Strategy (CFWCS) pursuant to the State Wildlife Grant Program (SWG), which was established through a federal appropriation 2001 to implement. The appropriation funded provisions of the Fish and Wildlife Conservation Act of 1980. The Association of Fish and Wildlife Agencies have described State Wildlife Grants as “our nation’s core program for preventing wildlife from becoming endangered”.

Montana’s CFWCS identified over 53 million acres of land and 2,415 miles of rivers and streams as focus areas of conservation need. The focus areas represent those habitats in greatest need of conservation. If Montana is to be successful in conserving, enhancing and restoring the terrestrial and aquatic habitats within these focus areas, then the programs of local, state and federal agencies and nonprofit organizations must be enlisted in achieving the goals of the CFWCS. In order for the CFWCS to achieve its potential, the CFWCS must provide a vision and organizing context for local, other state, federal and non-profit habitat conservation and restoration efforts that deliver on-the-ground results in Montana.

The Wildlife Conservation Society established a Wildlife Action Opportunities Fund through a grant received from the Doris Duke Charitable Foundation. The Wildlife Action Opportunities Fund provides competitive grants to conservation organizations that are focused on implementing priority actions and strategies identified in State Wildlife Action Plans. The Heart of the Rockies Initiative, working on behalf of the land trusts in Montana and in cooperation with Montana Fish, Wildlife and Parks was awarded a grant from this fund to develop a coordinated delivery mechanism for the habitat components of Montana’s CFWCS.

State and Federal agencies and non-profit organizations have come to realize the importance of forming partnerships for the purpose of achieving shared conservation objectives and several successful local efforts now are functioning in Montana. This project provided an opportunity to inventory existing local, state, federal and non-profit programs that can contribute to the habitat conservation and restoration needs identified in the CFWCS; to learn from many of those programs; to make more people aware of CFWCS; to work toward establishing a shared agenda for increasing the capacity of Montana to deliver the habitat conservation and restoration components of the CFWCS; and, to identify additional programs and funding that are needed to address unmet needs, and identify actions needed to establish those programs.

METHODOLOGY

This project proposed to build upon the CFWCS by reaching out and involving the individuals who administer key local, state, federal and nonprofit programs. The intent is to (1) better leverage those programs to achieve the habitat goals of the CFWCS; (2) identify unmet needs and opportunities for new programs and funding sources; and, (3) lay the

groundwork for coalitions and individual organizations that will advocate for new programs and funding in the public policy arena.

Our approach was an exercise in learning from the potential partners. We met with key individuals from XXX organizations and state and federal agencies to learn from them information about their current programs and projects; to hear their perspectives about their program objectives relative to the objectives in the CFWCS and corresponding opportunities for partnerships; to identify potential opportunities for advancing new partnerships; and, to discover key factors in achieving conservation through partnerships.

In selecting people with whom to meet, we strived to identify the more prominent conservation programs in Montana. We also understood the importance of reflecting on the diversity of conservation and restoration activity that currently occurs in Montana. Although we talked with many people, we know that we were not able to speak with everyone who might have shared good ideas. We did not intentionally exclude anyone. We are grateful to everyone who made the effort to share their perspectives with us.

The report that follows is a compilation of the wisdom of those who met with us. We assume that the participants were candid and that they honestly communicated their perceptions regarding conservation in Montana. Except for references to specific programs, the information is presented without attribution. Quotations are statements from the conversations. This report is not an exhaustive study, nor an end in itself. Rather, it is a place to continue a dialogue about advancing a shared conservation vision for Montana.

DESCRIPTION of the CURRENT SITUATION

Emerging Conservation Model for Montana

It is apparent from the conversations that Montana is on the cusp of a paradigm shift in its approach to natural resource conservation. The conservation model that is emerging reflects a transition from individual species management toward concern for species groups and conservation and restoration of habitats necessary to support those groups; a transition from using hunted and fished species as surrogates for sensitive species to using sensitive native species as the surrogates for other species, including hunted and fished species; a transition from an emphasis on sustaining populations to support hunting and angling toward sustaining ecological systems/landscapes and sustaining the communities that depend on those landscapes; a transition from agency directed/agency led conservation toward local initiatives and partnerships; a transition from agency identity to project and community identity; a transition from a focus on responding to current crises, wherever they occur, to a more strategic approach, based on species and habitat objectives, in response to long term threats to conservation; and, a transition from conflict to a recognition that success requires cooperation.

COMPREHENSIVE FISH and WILDLIFE CONSERVATION STRATEGY

CFWCS Development and Implementation

FWP developed the CFWCS in compliance with the following criteria, as defined by federal regulation: 1) Identify species in greatest need of conservation; 2) Identify essential habitats in greatest need of conservation; 3) Identify major problems impacting essential habitats; 4) Identify the actions necessary to conserve habitats and species in greatest need of conservation; 5. Identify the provisions for a monitoring program; 6. Identify a cycle for review of the strategy; 7) Develop a plan to identify potential partners and figure a program for coordination; and, 8) Document public involvement. The CFWCS was reviewed by a 13 member National Advisory Acceptance Team and approved by U.S. Fish and Wildlife Service in January 2006.

In developing the CFWCS, FWP evaluated 636 vertebrate species and 170 habitats. The document identifies 60 species in greatest need of conservation, including 1 mussel, 3 amphibians, 5 reptiles, 36 birds and 15 mammals. The CFWCS identified 30 habitats in the greatest need of conservation. These are the species and habitats that must be conserved to prevent further declines; to maintain Montana's rich fish and wildlife heritage; and, to help prevent future listings under the Federal Endangered Species Act.

Montana FWP recognizes this need, and has taken a very significant step towards engaging partners in the implementation of the CFWCS by designating a significant portion of its SWG funding (approximately \$1 million/year) for the next five years as matching funding for cooperative habitat conservation projects. The department is also committed to integrating funding from the Habitat Montana program (approximately \$5 million/year) and Future Fisheries Program (approximately \$1 million/year) into implementation of the CFWCS through cooperative habitat conservation projects. As one person observed, "FWP deserves a lot of credit for making the effort to include lots of people in the effort to develop CFWCS at the outset and for keeping them involved in the process."

To implement the CFWCS, FWP completed a five-year Action Plan in August, 2006. The Action Plan includes a schedule for receiving project proposals and criteria for reviewing project applications. FWP recruited a multi-interest Core Team to work with the Department's internal SWG Steering Committee to review applications and recommend projects to the Director for approval.

"CFWCS is not just about money. It is a different way of doing business among the natural resource management agencies and NGO's that also participate in conservation efforts."

Partner Perceptions of CFWCS

People have various perspectives about the nature and purpose of the CFWCS and they have engaged CFWCS at differing levels. CFWCS is well understood by those who participated in its development. Beyond that group, there is variable awareness of the document and its scope and intent. Although not its primary purpose, this project did provide an opportunity to introduce CFWCS to a broader audience.

At one level, there are some people who either were not aware of CFWCS or had only a vague awareness of the document. In some cases, this resulted because we looked broadly and included people who had no involvement in the development of CFWCS. In a few cases, there are people who are involved in projects that include SWG funding but did not

realize the relationship between CFWCS and SWG. Some people do not understand CFWCS and are intimidated by it. “What is FWP going to do to me as a consequence of CFWCS and ESA?”

Some people, including some who assisted in the development of CFWCS, think of CFWCS as the current version of the non-game program. They tend to think about it primarily as the framework for justifying and prioritizing projects for SWG funding, with a primary focus on projects intended to keep at risk species from being listed pursuant to the Endangered Species Act.

Some people think about CFWCS as the framework for comprehensive conservation. At a minimum, they think CFWCS should be the foundation for most FWP programs. “SWG provides for a more rounded approach to fish and wildlife management. FWP is brought into a broader conservation agenda.” One FWP employee suggested that “SWG has brought the game and non-game programs together.” “CFWCS should not be a SWG silo. Rather, it should be a driver for all FWP programs and a driver for other state agency programs that overlap with fish and wildlife.” “CFWCS should be institutional in FWP’s thinking.” “Native species are surrogates for a lot of other species.” While people support the idea of a more holistic approach to conservation, some people within FWP’s traditional constituency are concerned that game animals and game birds might get lost from the program during implementation. “CFWCS should not polarize the wildlife community.”

More broadly, some people think CFWCS, or a similar planning document, should be Montana’s vision for conservation. “CFWCS is not just FWP’s document.” “CFWCS provides an opportunity to focus all of the programs on conserving and restoring the best of what Montana has.” As such, they tend to view the CFWCS as the basis for the programs of other state and federal agencies whose mandates include responsibilities for fish and wildlife conservation. This perspective includes the idea that CFWCS ought to be the impetus for public/private conservation partnerships. As one participant noted, “If the emphasis is on native species, there are huge opportunities for partnerships.” CFWCS provides the direction. “The partners can bring conservation capacity – funding, political support and education – that helps the state achieve what otherwise might be beyond FWP’s capacity.”

One person noted that “conservation is consistent with Tribal culture.” Tribes feel a responsibility to “care for the grandchildren” and to “look out for the seventh generation”.

Irrespective of the level at which people have engaged CFWCS, most see value in the document or a similar planning tool. One participant suggested that “CFWCS could be used as a filter. It could be the framework for defining partnerships; the framework for identifying those places where partnerships can be most effective; and, the framework for sorting out competing interests.” At the same time, one person cautioned that “CFWCS provides information that people can use in making decisions. It is not the decision document for local groups.”

There is a measure of expectation that CFWCS could make a real difference in promoting conservation in Montana. “It is thrilling to see FWP interested in doing follow up for the purpose of implementing the CFWCS.” “CFWCS opens the gate for FWP to be more comprehensive, including doing more work with non-game. FWP has an opportunity to

learn from its partners, who already are doing this kind of conservation.” At the same time, however, there is a measure of skepticism regarding FWP’s commitment to CFWCS as a planning tool for anything other than SWG. There is uncertainty whether FWP is committed to a corresponding transition from a traditional focus on species management, especially management of game species, to a greater emphasis on comprehensive conservation. There also is uncertainty regarding the level of political support in Montana state government, at the cabinet level and in the Governor’s office.

The people with whom we met all have responsibilities for conservation. Most of the partners have completed some level of planning including the definition of objectives, priorities and strategies to achieve the purposes for their programs. However, there is not a single plan that embraces all of the plans and/or to which all of the plans respond. CFWCS could provide that function – but it does not yet serve that purpose.

On-the-ground conservation partnerships, consistent with the goals of CFWCS, already are happening in Montana and much of it has occurred without specific direction from CFWCS. As one person said, “Something is working for conservation because lots of people are pulling in more or less the same direction, even if they aren’t doing it together.” Examples include The Blackfoot Challenge; the work of several watershed groups, generally; the Montana Wetlands Legacy; the Joint Ventures; fish and wildlife mitigation, pursuant to the Columbia River Fish and Wildlife Program; the work of the various land trusts; and, the USFWS Partners with Fish and Wildlife program. Several of the local partnerships formed at the initiative of the participants. Several people noted that there are opportunities to build on these successes. Although these programs may be supported at the state/national level, they are not coordinated under a shared vision. Although many of these successes may not have been coordinated under direction from CFWCS, one person noted that “SWG has provided resources that facilitate the agencies working together toward common goals.” One person also cautioned that “FWP is not recognized as the leader for many of the people who currently are doing conservation work in Montana.”

CFWCS provides an opportunity to focus all of the programs on conserving and restoring the best of what Montana has. Several people noted that CFWCS needs more detail to guide implementation. The plan also needs a monitoring component.

While CFWCS identifies priorities defined by FWP, it may not adequately reflect the priorities of all of the partners. “CFWCS feels like an internal document. It is not responsive enough to the priorities of some of the other programs.” Some people are concerned that CFWCS does not put enough emphasis on riparian and wetland habitats. Some noted that CFWCS uses classifications that differ from classifications used by some of the partners. “Some of the specifics conflict because the focus area definitions were not responsive enough to the way that other groups think about ecosystems and habitats, e.g. the ecotypes are representative but not really functional systems. The ecotypes should step down a level to really focus on the areas of concern within the ecotypes.” Others suggested that CFWCS would be more useful if the focus areas included more detail. “Some of the focus areas include critical habitats that were obscured by the grouping of types (fens, wet meadows and small potholes).” Some suggested that CFWCS could have put more emphasis on riparian and wetlands because water is critical to everything else. Some suggested that “CFWCS has a high prevalence of peripheral species and species with limited

potential for conservation”. One person indicated that CFWCS is too general and does not put enough emphasis on non-game birds. Another person noted that there are some important species that also have high potential for conservation that aren’t referenced, e.g. the lark bunting. “Some species are listed as Tier 1, but their habitats are not designated as Tier 1.” “There is potential for spending too much money on obscure species rather than spending money more strategically.” Conservation of ponderosa pine on private forest lands is a priority for bird conservation in western Montana. This was not adequately referenced in the CFWCS. The document should have included the Columbian sharp-tailed grouse. It is a sensitive species and also has cultural significance for CS&KT. Some people noted that “CFWCS tends to emphasize the negative impacts of commercial land uses. Timber and range management can and should be part of the solution and not always criticized as part of the problem.” “The plan is good as far as it goes, but the plan could become a barrier if FWP is resistant to improvements that are responsive to the inherent differences in methodology and characterizations that other programs might use in working with ecosystems.” Although these criticisms were expressed, several people noted that these issues could be resolved in the transition to implementation.

USFS noted that the agency has adopted a policy of incorporating state action plans in the forest planning process. The agency has transitioned to doing projects based on landscape level analysis and resource integration. This transition includes the philosophy of doing the “right work at the right place, at the right time for the right reasons”. The agency understands that CFWCS provides a consistent framework incorporating that philosophy in forest and project level planning. BLM indicated that the next revisions to its Resource Management Plans will consider the CFWCS. BLM also has begun to use CFWCS to set priorities for implementation of the Resource Management Plans, as a source of information for NEPA analyses and to guide the development of wildlife stipulations for permits. NRCS used CFWCS when it updated its Wildlife Habitat Incentives Program. NRCS also noted that they could use CFWCS to make decisions regarding allocation of funds from other programs defined by the Farm Bill.

CFWCS could provide a framework for responding to emerging issues. Several partners noted the relevance of CFWCS to environmental reviews pursuant to the Montana and the National Environmental Policy Acts. They also noted its relevance to local land use planning.

CFWCS needs a higher profile. “The plan can’t go on the shelf. FWP needs to own CFWCS.” Unless the FWP Director and the Governor communicate the importance of the document and FWP consistently uses it in making decisions, it will be difficult for others to take CFWCS seriously.

One person suggested that this project “is a positive sign that Montana is stepping out”.

Points of Agreement

People recognized that the CFWCS goals and objectives overlap with the conservation goals and objectives of every state and federal agency with conservation responsibilities in Montana and with every Montana-based NGO with a conservation purpose. “It is pretty hard to disagree with conservation of wildlife habitat.” This is not necessarily a blanket

endorsement of CFWCS. But, there is general recognition that CFWCS is a good start to defining a shared conservation vision for Montana.

Several similar ideas were expressed by many of the people with whom we met. Although not everyone expressed these ideas, it is noteworthy that no one contradicted these ideas. Therefore, these ideas are offered as additional perspective to a shared conservation vision for Montana:

- Montana is a special place. We have a responsibility to conserve it.
- Sustainable communities and sustainable ecosystems are interdependent. Therefore, conservation of the communities and conservation of working landscapes are integral with ecological conservation. Working landscapes are important to our culture and important to maintaining open space.
- Implementation should be community based, with an emphasis on getting work done on the ground.
- To be successful, conservation will require people with multiple interests working together to achieve shared objectives.
- Effective communication must enfranchise people at the community level. The conservation programs must be responsive to priorities that have been identified at the local level. Approaches to conservation must respect the unique personality of individual communities.
- The conversation about conservation in Montana must move from a debate to a dialogue. There are real issues that separate people and those cannot be ignored. Resolving those issues requires dialogue.
- There is a need for state level leadership. Effective leadership must be facilitative and supportive of local initiative, i.e. “leading from behind”. It cannot be directive.
- Many Montana landscapes are intact. Protection of intact landscapes is less expensive than restoration. Therefore, conservation in Montana is cost-effective compared with conservation in other states. One participant also noted that restoration is easier in Montana than elsewhere because habitats are not as degraded. In degraded riparian habitats it may be necessary to restore vegetation and hydrology. But, the natural topography is still functionally intact.
- Lack of adequate funding is an important obstacle to achieving the CFWCS objectives through conservation partnerships.

PARTNERSHIPS

There are many competent people committed to conservation and doing good work, within their respective mandates. However, much of the conservation work is occurring within the broader context of a history of conflict between and among agencies and organizations.

People understand the value of partnership and want it to happen. “Additional resources can be developed if blended projects can be constructed to serve the shared interests of multiple programs.” “That notion of cooperation is out there. People understand that we have to cooperate to get conservation done.” Partnerships also bring shared expertise and a multi-disciplinary approach to complex conservation projects. At the same time, people are looking to FWP to be the catalyst to make partnerships happen. “FWP needs to appreciate that there are a lot of people who want to help with conservation and who want to do so in coordination with FWP.” Those partners with the capacity to implement conservation by

themselves may not wait for FWP. “People are doing conservation work in Montana and could do it with or without FWP. FWP needs to be engaged.”

“Complex projects have to be structured so that all of the partners feel as though they are being faithful to their own objectives.” People understand that the task of comprehensive conservation is larger than the mandate of any one agency or organization. They also understand that success necessarily will require cooperation in projects that are supported with two or more sponsors and funding sources. People understand that cooperative projects must develop around shared objectives. However, the predominant attitude among many still tends to give primacy to the objectives of the individual programs rather than defining shared objectives first and then working from shared objectives back to the individual programs.

People understand that cooperative conservation projects can be done but complex projects are just that – complex. “Complex projects can be done but we have to know going in that it won’t be easy; that it will take time; and, that we have to respect one another’s mission.” Different programs and funding sources have different requirements. A single project may require identification of distinct components with each component attributable to a specific program and funding source. Complex projects are not easy and they take time to pull together. The projects also can be frustrating, especially for partners who are unfamiliar with the process, anxious to begin work on the ground, or uncomfortable with restrictions associated with funding sources.

“Partners are people who share interests in a conservation outcome; each with a discrete role in accomplishing that outcome. Partnerships serve all of the interests.” “There is a difference between friends and partners. Friends want you to do projects; partners bring resources to the table and want to work together.”

Participants understood that a partnership approach represents a fundamental change in Montana’s approach to natural resource conservation. “Partnerships are a collection of people who want to give something to the relationship. We all have to give a little so that we can all get more because we are doing something together.” “We can’t afford to keep fighting among ourselves.” “We need to fine tune partnerships in adverse environments.”

Successful local efforts have developed plans that reflect the shared objectives of all of the partners and those plans are the basis for defining local priorities, schedules and responsibilities. The participants are able to find themselves as partners in the shared vision, without compromising their individual identities or the identities of the agencies whom they represent. Participants understand their respective roles and they follow through on their commitments.

Participants noted that it is important to focus on the common issues that bring people together. They noted that success begins with small projects for which it is easy to build agreement. In many communities, noxious weed projects could serve this purpose. Participants noted that, as they did smaller projects together, communications improved, relationships matured and, gradually, doors opened that allowed them to begin to address more complex conservation issues. And, as one person observed, “SWG programs have allowed us to interact with other agencies and pull together in the same direction.”

Natural resource management in Montana has a long history of confrontation among the various interest groups, among agencies and between environmental groups and ranchers. Disagreement regarding recreational access is a specific unresolved dispute that several people noted as a hindrance to formation of partnerships. Participants emphasized the importance of focusing on the common issues and stepping back from the issues which will take more time to resolve.

Money is not the only answer. In-kind contributions are important. Not only does it offset the need for more money but it also brings landowners into the project and, by working with it, they become committed to it. Participants noted that it is important to “value partners for what they are able to bring to the table.” Do not criticize them for what they don’t bring to the table.

Participants indicated that partnerships must be something more than just informing and involving the interested parties. “Everybody has to be at the table and sitting in chairs of the same height.” Partnerships are something more than just having all of the appropriate people at the table. People must be engaged. “There must be the expectation that people at the table have to be awake and ready to do their part.” And, in doing their part, the participants must be working for the benefit of the partnership “We have to have honest partners on all sides.” Partnerships are not about trade-offs. Rather, “We should focus on projects that everybody can buy into and from which everyone achieves something by working on the ground together.” Effective partnerships are also as much about the people as they are about the work of conservation. “Good relationships are important to good results.”

One person noted that resilience is one of the potential strengths of partnerships among people with diverse interests. “Get partners onto the same page to the point that the partners cover each others’ backs because these are the partnerships that get stronger in the middle of adversity.”

Lessons Learned from Local Working Groups

Much of the conservation work, consistent with the strategies identified in the CFWCS, that currently is occurring in Montana has been implemented through the efforts of watershed committees. Generally, the groups came together around a locally identified problem. Residents may not have agreed on the solution, but they agreed that there was a problem. The problem usually was recognized because there was a pending crisis, e.g. the threat of litigation or the threat of agency regulatory action. Successful groups had external support and start up financing for organization; facilitation to assist with the development of operation agreements; technical expertise; funding for projects to address issues related to the shared problem; and, an agency attitude that was supportive without being directive. Priorities and projects were generated from the ground up.

Local groups formed around inspired leadership. The leadership often came from people who were not functioning in designated leadership positions. Usually, the “leader” was a resident landowner who was respected by other members in the community. Sometimes leadership came from the agency representatives – staff who were willing and empowered to serve the partnership.

Local groups formed around the common ground, i.e. interests and values shared among participants who have serious disagreements about some issues. Rather than trying to solve the wedge issues, the “participants focused their efforts on establishing effective communication” and built trust by working on those issues about which they could agree. It often takes time, relative to opportune situations and inspired leadership for the partnerships to come together. Local working groups represent a change in attitude. But, no one wants to change first. “We all have to change together.” Partnerships cannot be forced. Trust is essential and “trust takes time and a lot of patience to build.” But, once relationships form, “cooperative projects can open other doors. One successful connection leads to another and pretty soon you have a cooperator.”

Successful local groups engaged all of the relevant players. All partners were involved in the planning process; participated in the definition of shared priorities; helped to write the grants; shared in decisions about project expenditures; participated in program outreach to the community; and, understood how these activities supported the shared objectives of the group’s action plan. Priorities were established in a way that enfranchised the people who would be affected by the decision. Decisions made sense to the people in the local community and the politics were taken out of the decision making process.

Participants noted that landowners are integral to successful local working groups. They have to feel as though their perspective is heard and respected. The right agency people also have to be involved and they have to respect the opinions of the landowners and spend the time to nurture relationships with individual landowners. “Everything happens at the kitchen table.” It is important to be patient and deal with issues that are important to the landowner

Participants noted that some lessons are transferable from one community to another. However, several people cautioned that each of the groups is somewhat unique, defined by the personalities of the local participants and the character of the community.

Participants also noted that watershed groups have difficulty in thinking strategically. Sometimes the groups chased funding sources and then defined projects around the available money rather than first identifying their priorities and then figuring out how to get the work done. Those that have been the most effective have taken the time to develop a good game plan.

Local working groups are an exercise in thinking small. It is comparatively easy to build agreement around small projects. One person suggested that an agency sponsored BBQ at the end of a community weed management day can be a significant investment in building relationships that lead to cooperation in more complex projects.

Local working groups can also be an exercise in thinking big. Some people expressed the opinion that the watershed committee approach is the model for the future of conservation in Montana. The potential for achieving conservation through local working groups is wide open. If a group is organized, has developed a good plan, knows what it wants to accomplish and has a structure designed for achievement, anything is possible.

Obstacles to Partnerships

People identified a variety of issues that could hinder effectively achieving the CFWCS objectives through conservation partners. Many of the participants referenced problems with attitudes. They suggested that agencies tend to impose their missions and mandates on others. Institutional barriers include a “go it alone” philosophy and the established histories of not partnering. Many people referenced turf issues and each of the agencies was mentioned at least once. “Agencies operate in a compromise mode – they need to shift from compromise mode to collaborative mode.” One person mentioned problems that result from “traditions. CFWCS requires that we look for new ways of doing business.”

“Organizational cultures differ among state agencies. It is important to understand how those cultural differences affect how people do business and how they affect public perception.” “Traditional adversarial relationships are an obstacle. Agencies have to be more selective in picking their battles – don’t fight over everything. Fighting over the same issues everywhere reduces agency credibility.”

“FWP’s culture does not value partnerships.” “CFWCS is a good idea but it will be difficult to implement because it is inconsistent with FWP’s agency culture.” “Within FWP, many of the biologists are not familiar with the plan and there is internal resistance to CFWCS. There also is a resistance to using license revenue to match SWG funds.”

One person noted that, within FWP, “significant unresolved issues are whether SWG should be used to fund projects whose priorities are defined by other programs; whether other programs should be used to fund projects that primarily respond to priorities defined in the SWG process; and, how to meld SWG and existing programs.”

The perception of problems with agency attitudes is not just held by people in the private sector. As one agency person said, “When I started this, I thought the challenge would be working with landowners. But, it really is the intra-agency and interagency work that is the challenge.”

One person noted that state government, generally, has not been “private land conservation friendly”. He went on to suggest that it is difficult for the private partners because the state’s philosophy of private land conservation changes with with different administrations and turnover among legislators.

Participants indicated that it often is difficult for partners to navigate the state and federal agency bureaucracies. Participants noted that there may be some legitimate legal barriers to partnerships and conflicting agency regulations. “We need to find away around conflicting regulations, i.e. one agency’s regulations that may not be compatible with the regulations of another.” However, they also suggested that legal issues may be used as excuses for the attitudinal resistance to partnering. “We need to be clear when it really is the regulations and not just attitudes that are in conflict.”

Administration of SWG can be an obstacle. The program currently requires a separate application for federal aid for each project. Thus, there is “a lot of administrative work for not a lot of money.” It is a challenge to be able to do several small projects under a single,

comprehensive application and to structure the matching dollars so that the match corresponds with the way that the SWG dollars are spent. When FWP re-grants SWG funds, FWP is accountable for project compliance and reporting but may not have oversight for the work of the third party.

Participants indicated that private landowners have difficulty working with the agencies. They do not understand or appreciate bureaucratic process. They may not trust the agencies. "It's a government program and there is a natural resistance among some landowners to work with government." Some are very reluctant to consider conservation easements. And, for those who participate in CRP, payments for easements might not be a financial incentive.

There is a lack of understanding of what it means to work in partnership. It was suggested that some people come to the table because they have to be at the table or because they do not want to be excluded. However, they may not come to the table with the intent to participate as a partner or to commit resources to shared priorities. Participants suggested that there is a lack of regard for the legitimate needs of others and that lack of respect compromises trust. Some participants noted their own contribution to this problem.

Several participants noted the history of antagonistic relationships among agencies and organizations related to a variety of conservation issues. "It is hard to work with people on one issue when you are in litigation with the same people on another issue." Others indicated that it is difficult for partnerships to mature in a low trust environment. "We devote too much time to fighting with one another. We have to build coalitions; build a bigger middle and dampen the influence of those on the extremes."

Generally, it was noted that attitude can be an issue at all levels. However, several participants noted that overcoming this problem must begin with the state and federal agencies and at the state level.

Most of the participants noted that the lack of adequate funding is a significant impediment to achieving conservation objectives in Montana. "The conservation task is large and there are too few programs and too little money to get the job done." "Too many people are operating and trying to do too much with too few resources." "For partnerships to work, all of the partners have to be able to follow through. Agency budget cycles sometimes can be an obstacle." Competition for limited resources also is an impediment to partnerships. State funding sources are inadequate to address state priorities. One person suggested that Montana is too dependant on federal funds and those funds come with strings attached. At times, the federal strings can be impediments to partnerships.

Some participants suggested that the private groups could be more effective if they were getting more out of the partnership. They noted that agencies need to better recognize the NGO's for what they can do and contract with them to do that work. Some people noted that FWP tends to allocate SWG funds in house. "SWG is too internal and the process for approving grants is too secret. People are not aware of the SWG cycle." "It feels like there are insiders and outsiders in the SWG program and it is not comfortable for those who are on the outside. SWG feels more like another program to build the agency than a program to develop partnerships." They suggested that committing a portion of the SWG funds to

grants with private partners would demonstrate FWP's commitment to working in partnership and might help the private organizations leverage other funds. FWP noted that it is reluctant to re-grant the SWG funds because the agency retains accountability for expenditure of the funds and also is responsible for the reporting requirements.

One person also noted that NGO relationships with agencies tend to be one way. "We are called to the table so that the (agency) person who called the meeting can figure out how to use us." The agencies are interested in how the NGO's can help the agencies but there is no reciprocation. "I don't get the feeling that we are really sharing."

Some people noted that there are different groups "competing to do the same projects, competing for the same funds, competing for recognition and competing for political support." There is a lack of knowledge about how to more effectively leverage those funds that are available. It was noted that the federal agencies also are in competition for the limited Land and Water Conservation Funds. Currently, there is no framework for thinking strategically among the partners regarding the allocation of limited funds relative to shared priorities.

Some participants noted that organizational capacity is essential to effective partnerships. Some groups are better organized and have more staff than others. Those with fewer staff may not have the resources to search out, apply for and administer grants. One individual noted that all of the land trusts are working at capacity. "There are more opportunities than the land trusts have capacity to complete land deals."

Several agency employees also mentioned limitations related to capacity. Most agency employees have responsibilities other than just cooperative projects. "Partnerships, grant accountability, monitoring, selection of contractors, technical support to others who are writing grants, approval of project designs, etc. all demand staff time."

As with the agencies, NGO's also tend to focus on their own programs and priorities. "People hold their cards close to the chest. Land trusts are in it to do the work but they also have to make money to remain as viable organizations. Sometimes, the two conflict." "A challenge to FWP is to stimulate, inform and involve the other partners to engage beyond the level of organizational survival. We are all in this together and all have to be working for the shared objectives."

One participant noted that jurisdictional issues in the contract language for funding agreements can hinder partnerships when one of the partners is an entity within tribal government. This person also noted that Tribes may not have the staff necessary to properly administer grants. Another person noted that it often is more difficult for the Tribes to get money for infrastructure than funding for projects.

A few people noted that cooperative projects are a challenge for the Tribes. Tribes do not have much money for funding projects and the amount of potential funding for conservation on reservations is limited. Tribal staff also have limited authority for committing the Tribe. "Projects have to be approved through the Tribal Council and the Tribe does not perceive that Montana operates from the perspective of a government-to-government relationship." "It is important to keep the Tribal Council informed. They do

not like secrets.” Another person said, “Consultation with the Tribes means telling the Tribes about the issue and involving the tribes in the development of the decision – not just making a decision and telling the Tribes what the agencies did.” It also was noted that “the State only comes to the Tribe when the State wants something from the Tribe – not because they have something to offer the Tribe.” But, the CS&KT also noted that “The State/Tribal agreement has had positive spin-offs.” Improvements in state/tribal relationships also were mentioned by other Tribes. But, one person noted that “it works well with the Region, but not with Helena.”

One person noted that, in many basins, water rights have not yet been adjudicated. The process for transferring water rights is time consuming and cumbersome.

Several participants noted that partnerships don’t just happen. They require time and patience. Agency turnover frustrates landowners. Relationships take time to build and whenever agencies bring in new field personnel, the new person tends to want to re-do existing plans and agreements that were developed with the landowner. One person noted that some of the partnership agreements are long-term commitments. “How do we maintain the commitments when personnel and leadership change?” Another person noted that the lack of consistent engagement is an obstacle. “Everyone has other jobs. It is not always easy to keep people engaged and to keep the energy going.”

Many participants noted the importance of a community based approach to conservation. However, some participants noted that the agencies do not recognize the work that is being accomplished by the local groups. The agencies also do not appreciate the value of the relationships that the groups have developed at the local level. It also was noted that watershed groups are potentially in trouble because of reductions in some of the traditional funding sources for these efforts. Moreover, some participants noted the potential for tension between the watershed groups and the conservation districts. The watershed approach represents a change from the traditional way of accomplishing conservation at the local level. Watershed boundaries do not always correspond to conservation district boundaries. Moreover, watershed groups and conservation districts sometimes are in competition for the same funds.

Many of the participants indicated that working with individual landowners, especially traditional landowners, is essential to achieving the goals of CFWCS. But, attitudes about landowners can be an obstacle. “People want agriculture to be part of the solution. But, they don’t always look at what it takes for agriculture to be viable.” Some landowners perceive that others in the conservation community perceive traditional agriculture as a problem. One person noted that CFWCS “presents agriculture as a threat.” But, as one person noted, “There isn’t a rancher in the state who gets up in the morning and asks, ‘how can I screw things up today?’” “Landowners do not want to see species eliminated. But, they also do not want to be unfairly burdened for the responsibility to conserving sensitive species.” “Conservation is happening because people think it is the right thing to do. But, people don’t get recognized for it.” Another person said, “Most farmers and ranchers want to do the right thing. The willingness is there. But, they may not know what the right thing and they may not have the resources to do the right thing.” Another person said, “If we want to have conservation, we have to help the landowner get the job done. If we can help the landowner do the right thing, they will often do it.”

Another person observed that “CFWCS tends to emphasize the negative impacts of commercial land uses. Timber and range management can and should be part of the solution and not always criticized as part of the problem.”

One person noted that “There is a different dynamic when working with a traditional and a non-traditional landowner. Non-traditional landowners are more comfortable working with agencies, but they are not connected to the local culture, they are not connected to the land and they are not committed to the community.”

One person noted a discomfort that land trusts are making a “profit” when they participate as a third party in a transaction between the landowner and the government. At the same time, the federal agencies noted that third parties are invaluable to completion of many of the conservation easements in Montana. Federal projects take three years to complete and, when the project begins, there is uncertainty whether the federal funding will be there when the deal is complete. Participation by a third party makes it possible for the landowner to receive payment prior to completion of the project and for the third party to assume the risk. The third party also is able to assume the difference, if the purchase price differs from the appraised value of the easement. Another person said, “Land trusts are a blessing. They are doing the work on the ground and they are doing a lot to generate the match for federal funds.”

A few people noted that the “hunter conservationists are important players in achieving the goals of CFWCS.” The organizations with which the hunter conservations affiliate might be “uniquely positioned to bridge between the traditional hunter conservationist and management for sensitive species.” However, the organizations might have difficulty fully participating in partnership projects because their memberships are interested in supporting projects that enhance habitat for commonly hunted species. These are not sensitive species. But, much of the habitat that is important for hunted species “also is important habitat for sensitive species.”

Several people suggested that, while everyone is interested in conservation, there is not yet a shared vision for conservation in Montana. “We all are basically headed in the same direction, but we often disagree about how to get there.” One person defined success as, “Agency loggerheads have moved from disagreements over goals to disagreements about how to achieve the shared goals.”

Threats to Landscape Conservation

Participants noted several challenges to achieving the goals and objectives defined by the CFWCS. And, as one person cautioned, “Don’t lose sight of the fact that there is a lot of work left to do.”

Several people mentioned concerns related to land use planning. “There is an insatiable demand for property in Montana. Land values are increasing at a rate of 15 to 20% per year.” These changes often are occurring without sufficient forethought and in an environment that resists land use planning and regulation. “Real estate development is occurring without adequate sub-division regulation.” Water development in sub-divisions

was mentioned as a specific issue related to land use planning. “Montana does not have the tools to accommodate growth with existing water rights.”

Important habitats in Montana are changing from traditional working landscapes to either sub-divisions or to properties held by wealthy, non-residents. “Montana is losing 43 acres/day of agricultural land to other land uses.” Concerns were expressed about the potential for changing social values that might result from changes in land ownership and land use. “Private land conservation is essential to the quality of life in Montana.” Changes from traditional land uses might result in the loss of working landscapes with corresponding effects on agriculture, forestry, hunting, fishing, and, in general, the Montana lifestyle. These changes could also affect opportunities for using forest and range management tools to achieve conservation objectives.

Several people talked about the pace of change relative to the pace at which conservation can be achieved. “We can’t get out ahead of it and it is hard to match the dollar amounts of the development values.” “Habitats are degrading faster than we can protect and restore them.”

Concerns were expressed about the potential for land use changes that might be consistent with conservation objectives but might conflict with traditional Montana values. Some properties have been acquired for recreational purposes. The new owners often are interested in landscape conservation but may not understand Montana traditions. “There is value in keeping traditional landowners on the ground. There also is value in helping new landowners integrate into the community.”

One person talked about the potential for “conservation for profit”. This person mentioned the conversion of properties to free-based recreation. He also noted venture capitalists’ interest in investing in properties that have potential for conservation/restoration, could attract grant funding for conservation projects and then re-sold for a profit. “Such projects have potential for mitigation banking and can contribute to a restoration economy. However, they also represent a shift in social values and the lack of public access to the properties is of concern.” This person recommended developing a strategy to work with, rather than against, people who are involved in conservation for profit.

Concerns were expressed about the implications of Plum Creek’s transition from a timber company to a real estate investment trust.

Several people expressed concerns about threats to water. Critical issues include stream degradation; dewatering; non-point source pollution; and, the proximity of development to streams.

Several people expressed concerns about the consequences of energy development on sensitive species and the ability to achieve objectives defined by CFWCS. Critical issues include coal bed methane, petroleum exploration and development in southwestern and northeastern Montana and policy changes that might be included in the new farm bill to promote ethanol production. It also was noted that “CFWCS provides a framework for addressing the threats.”

Participants noted that, traditionally, FWP has responded to each threat as it arose, i.e. “the crisis du Jour”. However, some people noted that CFWCS provides an opportunity to prioritize responses to threats based on habitat. They suggested using CFWCS to identify the “best of the best” among the conservation areas and focus protection activities on those habitats, rather than focus conservation efforts around concentrated development activities. It was noted that this approach would involve making tradeoffs, but that those decisions would have been made strategically, based on the value of particular landscapes to achieving long-term conservation objectives.

Several people mentioned concern for climate change and the inability to predict, with certainty, how climate change will affect the ability to achieve conservation objectives. However, some people suggested that conserving priority landscapes, as defined by CFWCS, offers the greatest potential for ensuring viable populations of sensitive species in that uncertain future. “Montana is a potential refuge in the face of climate change. It is critical to be attentive to restoration of damaged habitats and thereby enhance the resilience and survival of native species.”

Conservation Partnership Opportunities

In addition to using CFWCS as a way to think strategically in response to threats to conservation, participants noted that CFWCS could be used to prioritize protection of important habitats. Some people suggested using CFWCS to prioritize conservation of riparian corridors and wildlife movement corridors and linkage zones. CFWCS also could serve as a catalyst to bring partners together to work toward these conservation objectives. “The best opportunities for partnerships are places where we can use funds from a variety of sources to pool resources sufficient to attract landowners.” CFWCS, in many respects, provides a framework for working with agriculture to achieve conservation objectives on private lands. “The best opportunity for achieving the goals in the CFWCS is in the farm bill. The farm bill brings large sums of money into the state and several of the programs have a wildlife component.”

Private land conservation has to be part of the CFWCS strategy. “The priority habitats identified by CFWCS are dominated by private land.”

It was noted that CFWCS already provides valuable information to federal land managers in both developing and guiding the implementation of land use plans. Reference to CFWCS in Forest Plans and Resource Management Plans also increases the potential for funding projects related to plan implementation. It also was noted that CFWCS includes important information that could be used more comprehensively for land use planning by local governments. DNRC has incorporated CFWCS in the tool kit that it provides to private forestland owners. CFWCS could be used as a “benchmark for the sale of school trust lands, land banking and development decisions on school trust lands.”

Several of the other participants expressed keen interest in working with Plum Creek and others to protect conservation values associated with the current Plum Creek holdings. Plum Creek indicated that, as their business model changes, they need to be able to work with FWP and other conservation partners earlier in the land use planning process, i.e. involvement when there is opportunity to build conservation measures into the design of

developments rather than fighting about the project during the final phase. Plum Creek indicated a need for information from the partners and the partners need to be comfortable in how the information will be used.

There are opportunities for working with the fish and wildlife mitigation programs as the basis for conservation partnerships in northwestern Montana. Plum Creek also indicated that more could be accomplished for native fish species west of the continental divide by building conservation programs around its Habitat Conservation Plan for native fish species. “With the Native Fish HCP in place, there are opportunities to leverage Sec. 6 funding for land acquisitions that support the objectives of the HCP.”

There is potential for achieving CFWCS objectives in other management programs that otherwise are not related to SWG. Participants noted that CFWCS can be a catalyst for a different approach to land use planning/analysis/implementation. USFS participants indicated that there is a directive to incorporate state action plans into the forest plans. In Montana, USFS currently uses CFWCS to help set priorities for forest restoration, fuels reduction and other projects. USFS has begun to use “Stewardship Contracting” as an alternative to traditional timber sales as a way to exchange goods for on-the-ground conservation services. If approved, pending legislation would authorize a pilot project for one Montana ranger district to employ stewardship contracting as the preferred approach to forest plan implementation. CFWCS could be used to guide the use of this tool for the restoration of fish and wildlife habitat. CFWCS could be used in the permitting process pursuant to the Major Facility Siting Act for identifying impacts and identifying opportunities for mitigation. In addition, survey information acquired for permits could be available for other priority conservation purposes, as identified by CFWCS.

Several people suggested that need for a more integrated approach to planning in priority areas with multiple land ownerships. Planning could be done jointly, focused on common objectives. But, implementation of the joint plans should be accomplished on a schedule and in a manner that corresponds with the mandates of the respective agencies and landowners.

Others noted the importance of local land use planning. They suggested that “CFWCS should be used to inform decisions by local planning boards and county commissioners as a tool in developing growth policies and land use regulations.” There is “potential to modify sub-division regulations to incorporate criteria that define critical habitats; establish buffer areas; and, require higher levels of review. There also is the potential to incorporate good wildlife information into growth policies.” It also was noted that CFWCS could be incorporated into educational brochures that offer guidance to landowners regarding development. At the same time, however, one person noted that “within the wildlife community (including disagreements between FWP and some of the wildlife advocates) about what the wildlife assessment means and how to use the information in the review of proposed sub-divisions.”

Others referenced a need for more monitoring. Monitoring is necessary to demonstrate success of projects. It is easier to get funding for restoration projects than to get funding for monitoring. Yet, at some point, we will need the monitoring information to demonstrate the success of the restoration.

Two major and related landscape conservation initiatives, the “Crown of the Continent” and the “Heart of the Rockies”, are currently in progress in Montana. Several parties also are interested in ensuring long-term conservation on parcels in Plum Creek ownership if those parcels are sold to other parties. CFWCS provides one way to help clarify shared priorities in these project areas.

Several people stressed the importance of conserving wetlands, riparian habitats and adjacent native grasslands. “We can’t do wetland/riparian conservation without also doing prairie conservation.” Some people noted that wetlands, riparian habitats, water quality and water rights are interrelated issues and should be addressed together. In such situations, properties with senior water rights should be priority. People also noted that monitoring and evaluation should be an integral component of these projects.

One person identified the opportunity for “abandoned mine restoration in prairie habitats, with priorities for the work defined by the goals and objectives of CFWCS.” Another noted that streams impaired by previous mining are logical sites to consider for reclamation and funding is available for these projects. However, he cautioned that “it is difficult to do restoration projects at mines because of the resulting liabilities associated with hazardous waste.”

One person indicated that the Montana bird conservation partnership is active in the west and active in the extreme northeast. However, there is no active partnership for bird conservation in most of the rest of the state. There is a need for local working groups working to identify bird habitat conservation areas and local habitat priorities. One person said, “Water makes the world go round, especially in a semi-arid environment. We can rally around the river systems in eastern Montana.” “People can coalesce around the objective of conserving native grasslands and cattlemen are transitioning to being grassland conservationists.” Another person said, “We need more work in eastern Montana. We have to get the two joint ventures up to the same level as that of the Intermountain West Joint Venture.” Another person noted that “we need to develop priorities for the grasslands.” However, another person identified one unresolved issue related to bird conservation. “There is disagreement among advocates for birds. Some people advocate for protection of sensitive bird species. Other people are more interested in using birds, common as well as sensitive species, as indicators of landscape health.”

One person noted the importance of maintaining the cottonwood forest associated with the Yellowstone River in eastern Montana.

Several people suggested that there is a need for more outreach to landowners. One person suggested that “if we expect to include landowners in implementing solutions, they also need to be involved in the definition of the problem.” Another person suggested, “Landowners need to understand that they can participate in Candidate Conservation Agreements with Assurances without giving up that much.” It also was noted that landowners are becoming more aware of the non-agricultural value of their property and that improving riparian habitats adds value to their land and that awareness could be shared with others. “Projects have to include tangible benefits for the cooperating landowner.” The benefit could be monetary, but it does not have to be. Other benefits to landowners include technical

support (“help the rancher understand and achieve benefits from a more efficient and sustainable operation”; assurances that the rancher won’t be impacted by new regulations (“don’t punish the landowners because they choose to participate and try to do things right”); and, respect. One person identified the need for a “mechanism for allowing partners to participate in landowners’ operations without the landowners feeling they are being abused for their participation.” Another person suggested that “Conservation Districts have an important role to play, especially in those places where there are not active watershed groups – particularly eastern Montana.”

One person noted the opportunity to include schools in community based conservation projects. Students, under the direction of a teacher, can assist with monitoring projects.

Several of the Tribes have established bison herds. The American Prairie Foundation is also working to establish a bison herd in the Missouri River Breaks. There is potential for working with several sensitive prairie species that occur in association with bison.

One person suggested the need to focus on “connecting CFWCS with sustainable economic development – CFWCS should connect with Montana’s future. CFWCS should nest well with initiatives for energy development and economic development.” Another person mentioned opportunities related to achieving conservation through promoting sustainable agriculture and related to changes in crops and farming practices. A few people mentioned concerns about energy development related to sagebrush and sage grouse restoration. They suggested that it will be important to “engage industry in restoration, monitoring and evaluation.”

There is an opportunity to structure conservation projects that also fulfill permit requirements for petroleum development. One BLM employee discussed the potential for working with the petroleum industry. Companies have an incentive to do conservation projects to fulfill the provisions of their permits. And, when companies agree to fund the work, projects can be accomplished quickly. Given the current interest in permitting and the related concerns about the impacts to sage grouse and sage brush habitat associated with energy development, there also is the potential for funding sage grouse work through the agency’s budget planning system. However, there could be a 4-year lag between the project proposal and receipt of the funding.

Some people suggested that stewardship contracting is one specific way to bridge conservation and economic opportunity in forested environments. Stewardship contracting is a way to develop a broader base of support for projects that have been developed through a landscape level planning effort. “Stewardship contracting is a way to keep industry viable in communities where traditional forest industry is no longer viable.” The concept has the potential to help break some of the traditional gridlock because it is being accepted by some in the environmental community. “People are accepting the temporary footprint that results from projects and they have greater confidence that the promised restoration work will actually get accomplished on the ground.” One person suggested a “DNRC/FWP partnership that allows for some timber harvest from lands acquired for conservation in exchange for standing timber left on school trust lands.”

Several people noted the importance of more effective communication among the partners. The three Joint Ventures have indicated an interest in helping to establish a steering committee in Montana specifically for the purpose of facilitating communication.

Funding

Most participants identified inadequate funding as a challenge to achieving the goals and objectives outlined by CFWCS. The need to effectively leverage existing funding sources can be a catalyst to effective conservation partnerships. However, competition for limited funding sources also can be an impediment to partnerships.

Participants suggested that there is the potential that the federal government might reduce the level of funding for SWG. Alternatively, if the federal government maintains or increases SWG funding, the availability of sufficient matching funds can be an impediment to effectively leveraging those funds.

One person suggested that “FWP needs to make important judgment calls about how to spend SWG funds. It is tempting to spend SWG funds in areas that already are being successful. However, it might be more important to focus the funds on groups that need a jump start to be able to begin to leverage funds from other sources.”

Some people noted that Montana, with the assistance of its Congressional delegation, has been successful in bringing Land and Water Conservation Funds into the state. However, Congress is likely to reduce the size of the program, with recent changes in the delegation, Montana likely will receive a smaller portion from this fund.

The Farm Bill currently provides a large source of money for conservation projects on agriculture lands in Montana. A few people noted that there is an opportunity to use CFWCS to influence priorities in the pending revisions to the Farm Bill.

Participants noted that, irrespective of the source, funds come with limitations on how the money may be used. Private groups who might be able to provide matching funds for state and federal funds might be reluctant to participate in cooperative projects because they are unwilling to accept the conditions that come with the funds. One person suggested that, because “federal funds with federal strings, we need to think in terms of what can be accomplished without federal money.”

A few participants suggested that Montana is too dependent on federal funding for doing conservation work. There is a need to develop a state funding source that is dedicated to landscape conservation. There is reluctance by some FWP staff and within some constituency groups to use license revenue to match federal funds for conservation programs that do not directly benefit hunting and fishing. “There is a need for strategy to enfranchise non-hunters/non-anglers in providing financial support to fish and wildlife conservation.”

Until recently, there was no dedicated source of state matching funds for SWG. This issue was addressed for the current biennium during the 2007 special session, when the Montana

Legislature approved \$1M per year as a general fund match for SWG. A few members of the Core Team help to develop this proposal and supported it during the session.

Longer term, there is a need for a “stable and predictable statewide funding base for CFWCS”. One person indicated that, as the effort is made to develop stable, long-term funding, the conservation partners need to be included in the conversation.

A few participants suggested that large foundations are an untapped resource. “We are doing good work but the projects are too small to attract their interest.” These people identified the need to aggregate several local projects into a single, statewide project and thus be able to market to large foundations. “The money is out there. We have to look for it and we have to get creative to be able to leverage it.” “Montana can attract private funding for conservation work tied to watersheds. We have to think strategically to get it.” “We have to think strategically in order to convert \$1million of SWG and \$1million of match into \$20million.”

One person noted that “different organizations are competing for the same funds, during the same funding cycle and sometimes for doing the same work.” This person suggested the need for more cooperation in setting statewide priorities for how best to use limited resources; submitting fewer proposals during any one granting cycle with broad support for those proposals which are submitted; and, sequencing otherwise competing proposals over several granting cycles.

One person suggested that “a variety of funding sources adds financial resilience.” But, another person suggested that “Money is not the only answer. In-kind contributions are important. Not only does it offset the need for more money but it also brings landowners into the project and, by working with it, they become committed to it.”

Communication/Outreach

Participants noted the importance of effective communication to developing a vision for conservation shared by a broad diversity of people in Montana. Effective communication also is essential to the formation of functional conservation collaborations. “The biggest need is an effort to bring the partners together.” “People need to understand the significance of the program. To understand that CFWCS is the solution, people first need to understand the problem.” “Communication must be sufficient to ensure that all players understand their respective roles.” One person identified the need for a “larger, grassroots media campaign that promotes the importance of water resources and engages a broader public in that conversation. There is a need to shift social expectations regarding watersheds, landscapes and conservation issues.”

Teaming with Wildlife is a current effort to develop broad understanding of SWG and CFWCS among FWP’s traditional constituents. However, there is not a similar understanding among people who either are not part of that constituency or who did not participate in the development of CFWCS. Thus, there is a need to bridge Teaming with Wildlife with the communication networks of others who are doing conservation work in Montana. “We need a community conservation discussion – a strategy to bring people into the conversation and then use the conversation to build an effective coalition.”

Participants specifically noted the lack of communication with landowners, except for those individuals who are actively involved with current conservation projects. “When working with FWP, first we have to build trust if we are serious about getting down to business.” “If the objective is long-term, on-the-ground conservation, FWP has to reach out to agriculture.” People suggested that agriculture could participate in CFWCS. “But, CFWCS has to be presented to them in a way that they can buy in.” “Conservation land management benefits agriculture. It is important to use the right educational tools to help landowners understand that conservation also sustains their operation.” One person suggested working with the Northern Ag Network to disseminate information related to CFWCS to the agriculture community. One person suggested that CFWCS could help FWP bridge with MSU Extension Service and, in turn, Extension could help with communication with the agriculture community. Another person suggested scheduling community meetings in the priority conservation areas identified in CFWCS.

Participants also noted that effective communication is essential for developing a broad base of political support for new initiatives and funding, at both the state and national level. Further, it was suggested that, at state level, support should be broad enough to minimize potential for strong political opposition. “Comprehensive conservation is not a partisan issue and is not caught up in partisan politics. There is potential for broad support if we are able to deliver on the idea that no other species need to be listed under the Endangered Species Act if we are able to identify and protect the most important habitats.” “Marketing of CFWCS is critical. Good ecology and community stability are marketable for building coalitions.”

One person noted the importance of having a consistent message regarding private land conservation. Regardless of which of the agencies or private organizations provide the message, it should be the same. This person also noted that agency field staff should be prepared to share this message because they regularly interact with people at the local level. However, he also cautioned that, if the message is communicated, the agency also has to be prepared to follow through.

SUCCESS

Partners thought of success at various levels, from the perspective of individual projects and programs, to a sustainable SWG program and to a long-term, comprehensive conservation perspective. People expressed their understanding of success in terms of achieving the objectives of their own programs, achieving the objectives of CFWCS and achieving conservation through partnerships in a variety of ways. Some tended to focus more on the conservation results. We are making “demonstrable improvements in discrete places that are identified as priorities in the CFWCS.” “We have maintained a full representation of native wildlife and we have maintained open space in Montana and the adjacent northern Rockies.” We are “keeping grass on the landscape”. “Keep the common species common.” “Protect what we have and restore as much as we can.” Success is a “dynamic equilibrium such that, over time, we maintain functioning ecosystems and we meet the needs of sensitive species.”

Others talked about the processes through which conservation is accomplished. “All landownerships must contribute to the mutual conservation goals, in a manner that is

appropriate to their primary management purpose. Public lands are a key component, but working ranches and working private forest lands should also complement the conservation objective.” “We want to keep the ranchers viable and maintain healthy habitats.” “Agency loggerheads have moved from disagreements over goals to disagreements about how to achieve the shared goals.” “Historic adversaries are working together to accomplish things on the landscape.” “Partners are vested more in the resource than in their respective programs.” “The agencies can walk away because the landowners are able to do it on their own. We have grown out of the need for an organized program.” “We are making progress – conservation is happening through legislation; the acquisition of interests in lands; and, through informed individuals voluntarily doing conservation on their own land.” “All of us who have a part can stand back and say, ‘Wow! Look what we got done, proving that wildlife conservation and maintaining working landscapes are compatible’.”

“Partnerships promote a more timely response and ensure that more areas are protected.” “We (NGO’s) are able to do the best job that we can, with the things that we are best positioned to do and there is support for us doing it and the results are appreciated.” “The SWG piece is a small amount of the necessary funds to achieve the conservation objectives. Success is the ability to leverage that small amount of money into a much larger pot of money.” “We have brought new financial resources into Montana – money from new sources, not just more money from existing sources.” “Attributes of success include coordination at the local level; grants that are well managed; good upfront watershed planning; a focus on identified restoration targets; and, monitoring to demonstrate the outcomes.”

Others reflected on changing social attitudes regarding conservation. “We have defined what conservation really means so that people are able to buy into the definition.” “Many things divide active Montanans. However, most people support fish, wildlife and clean water. We have focused on the commonalities rather than the related management questions that divide us. We have translated the common interest in fish and wildlife into a vision that works on the ground and made it a priority to disseminate that vision.” We have destroyed “the myth that environment and good jobs are mutually exclusive.” Montana has a brand. We are not just the Big Sky Country. “Montana is the Serengeti of North America”. This brand and the values associated with it are shared with non-traditional partners and all of Montana – not just those in the conservation community. The Montana culture values stewardship.”

For some people, success means that changing social attitudes translate into broader political support for conservation. Success means that “CFWCS is politically acceptable to governor and the legislature and that it provides a foundation for management of fish and wildlife resources.” Changing social attitudes also translate into reduced appeals and litigation for public land management programs and broader public acceptance of what USFS and BLM are doing and the reasons they do what they do.”

Keys to Success

Participants identified a variety of factors that they thought to be essential to make success happen. Many of these factors are reflected in the discussion of partnerships. Specific factors include:

- A Statewide conservation vision that embraces local priorities and initiatives;
- A conservation vision developed around principles of sustainability; the integration of ecological integrity, economic feasibility and social acceptance; and the interdependence of sustainable ecosystems and sustainable communities that depend on those ecosystems.
- A multi-disciplinary approach
- Leadership that is perceived as objective, reliable and committed;
- An identified champion for CFWCS, a person who is determined to get conservation done;
- Visible support for CFWCS from the Governor's office and the natural resources sub-cabinet;
- Alignment within FWP and a commitment to integrate CFWCS into all department programs;
- Allocation of FWP staff time according to priorities defined by CFWCS;
- Shared vision among FWP, DNRC and DEQ and a commitment to landscape level conservation;
- FWP fully engaged with the partners and SWG fully integrated with the partner's programs;
- Effective integration of CFWCS into federal land management planning; models of agencies using CFWCS and using CFWCS for the right reason;
- Frequent and thorough communication among the partners;
- A better understanding of the respective strengths of the partners;
- Inclusiveness; and,
- A broad base of public support for landscape level conservation, including local buy in.

People noted that sufficient funding is important. Funding should be available to those groups who are expected to participate in projects. Moreover, "the agencies have to be sufficiently staffed so that the programs are approachable and useable by the groups who want to participate." One person suggested establishing a funding source to support the general operating expenses of local groups. "Don't support the groups just to have the groups. But, if the groups are functional and getting work accomplished on the ground, there should be some recognition of the group and support for the group to be able to function."

Some people stressed the importance of good planning. "Dollars spent on planning, if the plan is well written, developed collaboratively and responsive to the priorities of all partners, is a good investment." One person referenced the importance of "smart planning – not just a bunch of freckles on the map." Collaborative plans can be a very effective tool for leveraging grant funds to do projects. The plan must be a living document. The planning document also has to empower the individual agency plans upon which the planning document is developed. It also is important to translate the strategic plan into "a simple action plan that responds to shared priorities." "CFWCS has to be elevated above the level of just another plan by another agency."

Several people mentioned the importance of actually doing good work on the ground. Also, beyond starting projects, it is important to see the projects come to completion. It is easier for people to support projects and programs when they are able to see real accomplishments. "If you show success, you will be better served in the long run." "Use

the 5-year action plan to target the low-hanging fruit; build success stories around those project results; and, then use those stories to market success.”

Several people suggested that the agencies have to figure out a different way of leading the conservation effort in Montana. “We have to answer the question, “What is the appropriate role for agency people? How do we distinguish agency influence from agency power?” Or, as one person suggested, “the agencies have to lead from behind.” One person noted the importance of “flexible leadership. Leadership occurs at multiple levels, in the community and in the agencies.” Another person suggested that the agencies should “approach the groups with understanding and with resources that the groups need to be successful”.

While leadership is important, there also needs to be a “broad coalition that understands CFWCS, wants to follow the leadership and is committed to following through. It’s going to take a lot of shoulders to move this rock.” The diverse mix of people that comprises the coalition has to be meaningfully involved in the conservation effort.

People suggested that the agencies need to develop a framework for partnerships. Although the framework is defined at the state level, it should provide direction to the field that encourages partnerships. “The partnerships have to be real. It is not just a case of FWP helping other people spend their money. There has to be a real give and take.”

It was noted that “we need to break barriers among agencies at the state level.” “Value the people who think outside of the box – even if they have to be reined in once in awhile.” It also was noted that different agencies and organizations have different constituencies. For example, “DNRC has established relationships with industry folks. FWP has relationships with the conservation community. Both agencies work together to bring those people to the same table.”

A new perspective also is essential for agency people who work at the field level. There needs to be “a local face on the bureaucracy”. “Partnerships can’t work without a presence in the local community.” In the words of one long-term career field person, “Field biologists need to think outside their traditional roles. The job is changing and field personnel have to change if they want to be successful.” Another noted that staff have to be flexible. You have to be willing to work strange hours – not the normal agency schedule. No agency logos, etc. “This is not a uniform-wearing, 9-5 job.” “Landowners are often busy during the day. It is not possible for 9-5 employees to build relationships with them.” In this context, a few people also mentioned the importance of having agency field staff whose primary responsibilities are doing partnership projects.

A new perspective also relates to how agencies do work. “There is a fine line between the need to spend money on survey and inventory and the potential to spend all of the money on studies. Be content with lower quality data and, instead, spend the money doing projects on the ground, including on-going monitoring after the fact, i.e. adaptive management.” Good project planning includes defined goals and objectives; articulated uncertainties; a monitoring framework; and, implementation that includes a decision tree that anticipates change in response to new information obtained through monitoring.

Several people talked about the importance of building trust and the consequences of breaking trust. “People can buy into the plan if they trust the people who are responsible for the plan – not because they have read and understood the plan.”

In many respects, CFWCS outlines a strategy for private land conservation. “Success includes results that work for agriculture.” “When working with agriculture, it is important to remember that the landowner, not the agency, is the decision maker.” The agency should be there to help. The agency should be there to inform regarding appropriate conservation practices and which practices the agency will and will not support. But, the agency should not tell the landowner what to do because the landowner is the decision maker. “Listen to the landowners and trust them to offer solutions that will work for them. You cannot go in with a formula. Learn from them what their ranch is all about.” “If we want to have conservation, we have to help the landowner get the job done. If we can help the landowner do the right thing, they will often do it.”

“There is value in keeping traditional landowners on the ground. There also is value in helping new landowners integrate into the community.” “Maintaining working landscapes, protecting the county tax base and providing jobs are important considerations to successful land projects.”

Several people emphasized the importance of team work. “It is about conserving the resource, not about who gets the credit.” It also is important that everyone understand their respective roles, respect the roles of the other partners and follow through on their respective responsibilities. “If we all work together and bring our respective niches to the table and we are willing to compromise a bit, we can achieve a lot of conservation in Montana.” “Each partner is faithful to its mission while respecting the missions of the other partners.” Teamwork also includes making efficient use of one another’s time and involving partners early in projects so that they really have opportunity for meaningful involvement. “Live up to the commitments that you make. Don’t overextend yourself because it puts at risk your ability to follow through on the commitment.”

One person noted an important distinction between “collaboration” and “partnership”. If the expectation is that industry must be a partner in the solutions, then “industry can’t collaborate its way out of business.” Solutions are not about trade-offs. “We should focus on projects that everybody can buy into and from which everyone achieves something by working on the ground together.”

It was noted that conservation is not really about managing the resource. “Most natural resource decisions are social decisions – not technical decisions.” “Natural resource people generally are not good at working with people.” “99% of watershed management is people management.” “Science has to inform the decisions. But, science does not make the decisions.” “There is a fine line between success and failure and that fine line can be a barbed wire fence. Science tells us where to work and what to do. Art tells us how to work with people. The science and the art are transferable but those still have to be applied with respect for the personality of the local community.”

GAPS

Participants noted several specific “gaps” between the current situation in Montana and a functional partnership approach to achieving landscape conservation in Montana. Those include:

- There is a lack of a shared, statewide conservation vision. People might see themselves in the CFWCS but they may not be bought into the broader vision or they may lack confidence that others are bought into it.
- Montana lacks a process for collectively establishing statewide priorities. How do we set priorities? How do we do so, while also supporting the groups that are working in the lower priority areas?
- The task for coordinating a statewide, multi-interest conservation coalition has not yet been defined and assigned.
- Teaming with wildlife has not reached the agriculture community. Private landowners are essential to achieving landscape conservation. But, producers have not been involved in the development of the CFWCS.
- Identified conservation priorities exceed current funding allocated for conservation work in Montana. E.g. The Rocky Mountain Front is a “crisis of opportunity”. “If the state could put up \$5 million, the private sector could quickly come up with \$15 million to do conservation easements on the Rocky Mountain Front.”
- Lack of funding sources for monitoring. “The inability to predict results is not a justification for inaction.” “The science of restoration is still evolving. It is important to watch what is happening, monitor, acknowledge mistakes and learn from them.”
- The need for more coordination in central, south-central and southeastern Montana
- “Lack of political power is the Achilles heel for the program. It is critical to pull all of the interests under the same umbrella.”
- Several of the partners are using GIS capability. There is need for more communication and coordination among these efforts.

WEB-BASED TOOLS

The status assessment will be integrated with FWP’s Conservation Tracking Database that tracks accomplishments in Montana and tiers them to the national data base of State Wildlife Action Plan accomplishments. This component of the project provided participants an opportunity to suggest web-based tools that would be useful to people involved in conservation work in Montana. Suggestions included:

- Maps of partner priorities
- Project tracking tool
- Reporting tool
- Query tool
- Funding sources
- Grant application primer
- Handbooks

RECOMMENDATIONS

Several participants made specific suggestions about how to achieve the goals outlined in CFWCS through a conservation partnership approach.

One person suggested that CFWCS should have a higher profile. “Somebody of note (the Governor) has to make CFWCS a priority and must be consistent with that message.” It also was suggested that the Governor should sponsor a forum to feature CFWCS and encourage Montana to look forward to a new era of conservation.

One person suggested that the State of Montana needs a state land use plan and that CFWCS should be part of that larger state plan. The plan should be developed by FWP, DNRC and DEQ, working cooperatively and thinking strategically, together. The plan then would be the framework for evaluating priority issues around the state and provide an umbrella for planning at the watershed level. Another person suggested that the state and federal agencies reinstitute MOU’s at either the state level or specific to each of the CFWCS focus areas, as a framework for empowering local working groups.

Several others expressed similar ideas. One person suggested that Montana must “function like a watershed group at the state level” and develop programs around shared priorities. Another person suggested that “we need a unified voice for water in the state – a group that is able to think strategically and that promotes a common message at local, regional and statewide levels.” This approach would enable the state to work with the watershed model at a broader scale. “CFWCS is a logical framework for aggregating smaller projects.” By doing so, partnerships among several watershed groups could develop and the state would be better able to leverage big dollar amounts with then could be reallocated to several smaller projects and implemented by the partner groups.

Several people mentioned issues related to the lack of capacity in local communities. More communities might be interested in community based conservation, but they need help to get started. One person identified the need more designated local leaders, including agency staff, who have the responsibility for leading partnerships written into their job descriptions. Another person suggested that FWP should look at those places where SWG funds have been spent. Identify the community leaders associated with those projects, engage them, learn from them and discover what information can then be transferred to other communities.

Several people commented on difficulties associated with the process for applying for project funds, especially when partial funding comes from more than one state agency. One person suggested that the agencies should “streamline the process for applications and develop models that make it easier for partners to apply.” Another suggested that “There should be a logical mechanism for getting resources from the agencies to the groups who are getting work done on the ground. That doesn’t mean that every proposal gets funded – but a logical process that serves reasonable expectations.” Another person recommended that the state agencies should establish a partner task group and charge the group to develop a seamless, common project application process.

A few people mentioned that the Montana Wetlands Legacy is working to achieve the goals of CFWCS. This program could do more and it was suggested that FWP should do more to support it. “Wetlands Legacy should be a showcase program for FWP.” One person suggested “expanding the Wetland Legacy into a Habitat Legacy and then use it as the framework for advancing Farm Bill initiatives.”

A few people mentioned that Partners for Fish and Wildlife Program is working to achieve the goals of CFWCS. However USFWS has not been able to staff all of the Partners focus areas. It was suggested that FWP and USFWS should cooperate in staffing those vacant focus area positions. Similar suggestions were made regarding positions jointly funded by FWP and NRCS to assist in aligning expenditures pursuant to the Farm Bill with CFWCS.

A few people mentioned the need for more effective coordination specific to conservation of sensitive bird species. They suggested establishment of a jointly funded position, supported by agencies and NGO's and housed either at FWP or with one of the partner's. This position would have specific responsibilities for coordinating work with sensitive bird species.

One person suggested that FWP needs to define more wildlife projects that can be implemented like future fisheries, i.e. smaller projects that have opportunities for including multiple partners and showing some immediate on the ground improvements. This could start with pilot projects for habitat restoration.

Several people mentioned that SWG functions like a re-granting program in other states. They suggested that FWP would be more effective in developing partnerships with NGO's and in leveraging political support if FWP were they do re-grant a larger share of the SWG funds. "FWP could open doors if it were willing to share the SWG funds with NGO's." One person suggested that \$60,000/year should be set aside for small project grants.

Several people mentioned possible legislation that could be enacted to promote more conservation work in Montana. The need for a dedicated state funding source, committed to conservation, was mentioned often. Variations on the concept included re-authorizing and funding the Montana Agricultural Heritage Program; re-introduce legislation similar to SB 452 and SB 534 during the 2009 session; and, re-introduce legislation related to promoting Montana's restoration economy. "The Montana Agricultural Heritage Program was a well designed program and had the capacity to leverage \$8 for each \$1 in state funds. This program should be reauthorized." People also suggested that existing state and federal laws should be amended to require the use of state action plans in decisions regarding allocation of funds from various state and federal programs.

A few people suggested the need for a planning document that steps down from CFWCS and is responsive to the planning efforts of the other agencies and organizations. One person suggested establishing a partner task group, charged with the responsibility for articulating shared a shared vision and values and developing a shared action plan, including: shared objectives; shared priorities; agreement on implementation framework and schedule; and expression of mutual support for projects.

Prerequisites for state participation in SWG include each State's provisions for coordination during the development, implementation, review, and revision of its Strategy with Federal, State, and local agencies and Indian Tribes that manage significant areas of land or water within the State, or administer programs that significantly affect the conservation of species or their habitats. USFWS encouraged continued efforts to inform and involve Tribes during

the implementation of CFWCS. A similar perspective was expressed by a person who said, “the State needs to work on developing communication with the Tribe.”

In response to the threats to comprehensive landscape conservation, another person suggested establishing a partner task group to answer the unresolved and interrelated big questions:

- How do we define partnerships?
- How do we focus all of our energy in one direction?
- How does each partner find itself in a bigger scheme/shared vision?
- How do we set priorities that serve a shared vision?
- Where is the money, how do we find it and how do we spend it in a way that serves the shared vision?
- In the face of significant development pressures, how do we define “responsible”? Where is it appropriate to take a stand, where do we let go and where do we work for collaborative/balanced approaches?

NEXT STEPS

Potential actions to implement a coordinated delivery mechanism for the habitat components of Montana’s CFWCS, as suggested by persons who participated in interviews are presented in Appendix A. This table will be developed further, based on input from the November 1 Workshop.

POTENTIAL PARTNERS/PROGRAMS/FUNDING SOURCES

Agencies and organizations who administer programs that overlap with the CFWCS goals and objectives are listed in Appendix B. We acknowledge that the list is incomplete. But, it is a place for people to be looking for potential partners and a place to begin a more comprehensive and dynamic list of potential partners. We also caution that inclusion of an agency or organization in this list does represent a commitment by that entity.